YouGov Destination Index Trends

March 7, 2022
YouGov Syndicated Survey

- HTA subscribes to YouGov’s Brand Index and Profiles databases for the U.S., Japan, and Canada
- YouGov has a global consumer panel with over 6 million participants in 42 countries who take over 20 million surveys each year
- 10,000 consumers are surveyed each day
- HTA receives access to new data each week
- YouGov has daily brand tracking metrics – media-focused, brand health, purchase/intent, consumer status
Destination Index

• Metrics
  – Buzz
    • Net % of people that heard something positive about the brand in past two weeks minus % of people heard something negative about brand in past two weeks
  – Recommend
    • Net % would recommend to others minus % would tell to avoid
  – Word of Mouth Exposure
    • Yes% talked with someone about the brand (in-person, online or through social media)
  – Consideration
    • Yes% would consider purchasing a brand when next in market
  – Purchase Intent
    • Yes % most likely to visit the brand in question, of all brands considered

• Indexing
  – U.S. and Japan data are indexed to January 1, 2020, as a pre-COVID-19 baseline to compare magnitude in shifts across markets. Canada data began on September 18, 2020, well into the pandemic, and thus cannot be indexed to a pre-pandemic date.
<table>
<thead>
<tr>
<th>Date</th>
<th>Event Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>March 26, 2020</td>
<td>March 26, 2020 -- mandated 14-day quarantine for all travelers coming to Hawai'i goes into effect at 12:01 a.m.</td>
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<tr>
<td>June 24, 2020</td>
<td>June 24, 2020 -- Gov. Ige announces pre-travel testing program to avoid the mandatory quarantine starting Aug. 1st</td>
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<td>September 6-26, 2020</td>
<td>September 6-26, 2020 -- Hurricane Douglas passes close to the Hawaiian Islands</td>
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<tr>
<td>August 6, 2020</td>
<td>August 6, 2020 -- announcement that interisland travel quarantine will be reinstated starting Aug. 15th</td>
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<tr>
<td>September 16, 2020</td>
<td>September 16, 2020 -- pre-travel testing program launch pushed to Oct. 15th</td>
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<tr>
<td>October 15, 2020</td>
<td>October 15, 2020 -- pre-travel testing program officially begins</td>
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<tr>
<td>November 24, 2020</td>
<td>November 24, 2020 -- Kaua'i County announces they will opt out of Safe Travels program starting Dec. 2nd</td>
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<tr>
<td>July 27, 2020</td>
<td>July 27, 2020 -- Gov. Ige announces Hawai'i is being considered by Japan for resumption of international travel</td>
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<tr>
<td>September 6, 2020</td>
<td>September 6, 2020 -- pre-travel testing program launch pushed back to Oct. 1st, at the earliest</td>
</tr>
<tr>
<td>July 13, 2020</td>
<td>July 13, 2020 -- pre-travel testing program launch pushed back to Sept. 1st</td>
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2021 Significant Dates

January 12, 2021 – CDC recommends all international arrivals over the age of two get tested within three days before returning to the U.S.

January 26, 2021 – new CDC regulation goes into effect. All international arrivals (2+ years of age) to the U.S. must have a negative COVID-19 test within three days of departure to avoid a 10-day quarantine.

June 4, 2021 – Gov. Ige announces that starting June 15, all restrictions for inter-county travel will be lifted and travelers entering the state who have been vaccinated in Hawai‘i may bypass quarantine without a pre-travel test.

January 20, 2021 – all arriving passengers to Maui County must upload the AlohaSafe COVID-19 exposure app to their cell phones.

March 3, 2021 – Gov. Ige approves Kaua‘i’s re-entry into Safe Travels for Trans-Pacific travelers beginning April 5.

June 24, 2021 – Gov. Ige announces that individuals vaccinated in the U.S. will be able to bypass the testing/quarantine requirement with proof of vaccination through the state’s Safe Travels program.

August 23, 2021 – Gov. Ige announces “Now’s not a good time to visit Hawai‘i.”

November 8, 2021 – Non-citizen, non-immigrant air travelers to the United States will be required to be fully vaccinated and to provide proof of vaccination status prior to boarding an airplane to fly to the U.S.

November 19, 2021 – Governor Ige announced “Beginning November 1, we want to invite and encourage fully vaccinated visitors or residents to travel transpacific or inter-island.”

March 3, 2021 – Gov. Ige approves Kaua‘i’s re-entry into Safe Travels for Trans-Pacific travelers beginning April 5.

June 24, 2021 – Gov. Ige announces that individuals vaccinated in the U.S. will be able to bypass the testing/quarantine requirement with proof of vaccination through the state’s Safe Travels program.

November 8, 2021 – Non-citizen, non-immigrant air travelers to the United States will be required to be fully vaccinated and to provide proof of vaccination status prior to boarding an airplane to fly to the U.S.
2022 Significant Dates

March 1 2022 – Governor Ige announces Safe Travels Program ends on March 25, 2022
U.S. Destination Index Trends
Question: (Net) Over the PAST TWO WEEKS, which of the following destinations have you heard something POSITIVE about (whether in the news, through advertising, or talking to friends and family)? / Now which of the following have you heard something NEGATIVE about over the PAST TWO WEEKS?

Source: YouGov data as of March 7, 2022
Index of U.S. Buzz Net Score Two-Week Moving Average

Question: (Net) Over the PAST TWO WEEKS, which of the following destinations have you heard something POSITIVE about (whether in the news, through advertising, or talking to friends and family)? / Now which of the following have you heard something NEGATIVE about over the PAST TWO WEEKS?

Source: YouGov data as of March 7, 2022
Question: (Net) Which of the following destinations would you RECOMMEND to a friend or colleague? And which of the following destinations would you tell a friend or colleague to AVOID?

Source: YouGov data as of March 7, 2022
Index of U.S. Recommend Net Score Two-Week Moving Average

Question: (Net) Which of the following destinations would you RECOMMEND to a friend or colleague? / And which of the following destinations would you tell a friend or colleague to AVOID?

Source: HVCB analysis of YouGov data as of March 7, 2022
**Question: (Net) Which of the following destinations have you talked about with friends and family in the PAST TWO WEEKS (whether in-person, online, or through social media?)**

**Source:** YouGov data as of March 7, 2022
Index of U.S. Word of Mouth Exposure (% Yes) Two-Week Moving Average

Source: YouGov data as of March 7, 2022

Question: (Net) Which of the following destinations have you talked about with friends and family in the PAST TWO WEEKS (whether in-person, online, or through social media?)
U.S. Consideration (% Yes) Two-Week Moving Average

Question: (Net) Thinking about your next vacation by air alone or with friends, family, a partner or spouse, which of the following destinations would you consider?

Source: YouGov data as of March 7, 2022
Index of U.S. Consideration (% Yes) Two-Week Moving Average

Question: (Net) Thinking about your next vacation by air alone or with friends, family, a partner or spouse, which of the following destinations would you consider?

Source: YouGov data as of March 7, 2022
U.S. Purchase Intent (% Yes) Two-Week Moving Average

Question: (Net) Of the destinations considered, which are you most likely to visit?

Source: YouGov data as of March 7, 2022
Index of U.S. Purchase Intent (% Yes) Two-Week Moving Average

Question: (Net) Of the destinations considered, which are you most likely to visit?

Source: YouGov data as of March 7, 2022
Japan Destination Index Trends
Japan Buzz Net Score Two-Week Moving Average

Question: (Net) Over the PAST TWO WEEKS, which of the following destinations have you heard something POSITIVE about (whether in the news, through advertising, or talking to friends and family)? / Now which of the following have you heard something NEGATIVE about over the PAST TWO WEEKS?

*Kaua‘i is not included due to low response volume

Source: YouGov data as of March 7, 2022
Index of Japan Buzz Net Score Two-Week Moving Average

Question: (Net) Over the PAST TWO WEEKS, which of the following destinations have you heard something POSITIVE about (whether in the news, through advertising, or talking to friends and family)? / Now which of the following have you heard something NEGATIVE about over the PAST TWO WEEKS?

* Kaua'i is not included due to low response volume

Source: YouGov data as of March 7, 2022
Japan Recommend Net Score Two-Week Moving Average

Question: (Net) Which of the following destinations would you RECOMMEND to a friend or colleague? / And which of the following destinations would you tell a friend or colleague to AVOID?

*Kaua’i is not included due to low response volume

Source: YouGov data as of March 7, 2022
Index of Japan Recommend Net Score Two-Week Moving Average

*Kaua’i is not included due to low response volume

Source: YouGov data as of March 7, 2022
Question: (Net) Which of the following destinations have you talked about with friends and family in the PAST TWO WEEKS (whether in-person, online, or through social media?)

*Kaua’i is not included due to low response volume

Source: YouGov data as of March 7, 2022
Index of Japan Word of Mouth Exposure (% Yes) Two-Week Moving Average

Question: (Net) Which of the following destinations have you talked about with friends and family in the PAST TWO WEEKS (whether in-person, online, or through social media?)

*Kaua’i is not included due to low response volume

Source: YouGov data as of March 7, 2022
Question: (Net) Which of the following destinations have you talked about with friends and family in the PAST TWO WEEKS (whether in-person, online, or through social media?)

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Source: YouGov data as of March 7, 2022
Index of Japan Consideration (% Yes) Two-Week Moving Average

Question: (Net) Thinking about your next vacation by air alone or with friends, family, a partner or spouse, which of the following destinations would you consider?

*Kaua‘i is not included due to low response volume

Source: YouGov data as of March 7, 2022
Japan Purchase Intent (% Yes) Two-Week Moving Average

- Island of Hawai‘i
- Kaua‘i
- Maui
- O‘ahu
- State of Hawai‘i

Question: (Net) Of the destinations considered, which are you most likely to visit?

*Kaua‘i is not included due to low response volume

Source: YouGov data as of March 7, 2022
Index of Japan Purchase Intent (% Yes) Two-Week Moving Average

Question: (Net) Of the destinations considered, which are you most likely to visit?

*Kaua‘i is not included due to low response volume

Source: YouGov data as of March 7, 2022
Canada Destination Index Trends
Question: (Net) Over the PAST TWO WEEKS, which of the following destinations have you heard something POSITIVE about (whether in the news, through advertising, or talking to friends and family)? / Now which of the following have you heard something NEGATIVE about over the PAST TWO WEEKS?

*Island of Hawai‘i data not available until 1/20/2021

Source: YouGov data as of March 7, 2022
Question: (Net) Which of the following destinations would you RECOMMEND to a friend or colleague? / And which of the following destinations would you tell a friend or colleague to AVOID?

*Island of Hawai'i data not available until 1/20/2021

Source: YouGov data as of March 7, 2022
Canada Word of Mouth Exposure (% Yes) Two-Week Moving Average

Question: (Net) Which of the following destinations have you talked about with friends and family in the PAST TWO WEEKS (whether in-person, online, or through social media?)

*Island of Hawai‘i data not available until 1/20/2021

Source: YouGov data as of March 7, 2022
Question: (Net) Thinking about your next vacation by air alone or with friends, family, a partner or spouse, which of the following destinations would you consider?

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